

February 17, 2009

## **RUSSIAN NEW CAR MARKET PROVES ITS STRENGTH IN 2008**

- **Market growth slower in 2008 but remains up by 15.3%**
- **Lada still the market giant but loses share**
- **Other top ten brands increase sales in 2008**
- **Diesel gaining in popularity**

JATO Dynamics, the world's leading provider of automotive data and intelligence, today reports that despite the global economic downturn, the Russian market managed to increase new car sales by 15.25% in 2008, with 2,702,199 units during the year. This figure compares favourably with the 2,344,785 new units sold in 2007.

Most market segments have posted increased sales in 2008, although the utility/city car segment is a notable loser (down 2.1%) as well as luxury cars (down 15.8%) and large MPVs (down 5.2%); although the latter two segments both represent very small percentages of the overall market.

"The Russian market is still evolving and as increasing numbers of manufacturers introduce new models into the market and expand customer choice, it will continue to change its profile for some years to come", says David Di Girolamo, Business Manager for JATO Consult. "However, Russia's position as one of the largest and strongest global markets for new cars is still obvious."

## Segment Trends

JATO regional segment	Yr_08	Yr_07	% Change 2008	Diff 2008 vs. 2007	Market Share Yr_08
EU A - utility/city cars	59,223	60,470	-2.1%	-1,247	2.19%
EU B - small	410,721	335,131	+22.6%	+75,590	15.19%
EU C1 - lower medium -	1,251,766	1,148,382	+9.0%	+103,384	46.29%
EU C2 - lower medium +	134,753	91,814	+46.8%	+42,939	4.98%
EU D1 - upper medium -	165,211	161,947	+2.0%	+3,264	6.11%
EU D2 - upper medium +	34,854	30,444	+14.5%	+4,410	1.29%
EU E1 - large and executive	57,161	52,691	+8.5%	+4,470	2.11%
EU E2 - luxury	7,114	8,451	-15.8%	-1,337	0.26%
EU Mini MPV	82,168	69,733	+17.8%	+12,435	3.04%
EU Medium MPV	3,835	3,117	+23.0%	+718	0.14%
EU Large MPV	5,925	6,251	-5.2%	-326	0.22%
EU Small SUV	112,034	107,024	+4.7%	+5,010	4.14%
EU Medium SUV	284,065	198,283	+43.3%	+85,782	10.51%
EU Large SUV	30,519	23,788	+28.3%	+6,731	1.13%
EU Luxury SUV	54,699	40,161	+36.2%	+14,538	2.02%
EU Sports	6,606	4,907	+34.6%	+1,699	0.24%
Other	3,386	2,191	+54.5%	+1,195	0.13%
<b>Grand Total</b>	<b>2,704,040</b>	<b>2,344,785</b>	<b>+15.3%</b>	<b>+359,255</b>	<b>100.00%</b>

## Brand Performance

Lada continues to dominate the Russian market but increased competition from other European and Japanese brands has affected the company's market share. 2008 saw the brand lose 6.4% share (or 43,712 units), although with an overall market share of 23.69%, its position as Russia's favourite brand is still unassailable. Chevrolet takes second spot (up 23.6%), followed by Toyota (up 30.3%), Hyundai (up 35.2%) and Ford (up 4.8%). Although just outside the top ten brands, Honda is notable in having increased its sales by 130.8% in 2008 to 89,152 units, securing 3.3% of the overall market.

Make	Yr_08	Yr_07	% Change 2008	Diff 2008 vs. 2007	Market Share Yr_08
LADA	640,194	683,817	-6.4%	-43,623	23.68%
CHEVROLET	235,466	190,553	+23.6%	+44,913	8.71%
TOYOTA	188,866	144,975	+30.3%	+43,891	6.98%
HYUNDAI	185,471	137,151	+35.2%	+48,320	6.86%
FORD	174,190	166,144	+4.8%	+8,046	6.44%
NISSAN	143,256	114,389	+25.2%	+28,867	5.30%
RENAULT	106,677	99,844	+6.8%	+6,833	3.95%
MITSUBISHI	103,877	94,532	+9.9%	+9,345	3.84%
OPEL	98,545	66,329	+48.6%	+32,216	3.64%
DAEWOO	95,510	91,302	+4.6%	+4,208	3.53%

## Model Performance

Lada's position of strength in the market is illustrated by the fact that the top four selling models in 2008 were all from that manufacturer. Despite a drop in sales, the long-established 2105/2107 and Samara models take the top two slots respectively, followed by the Priora (up 120%) and the Kalina (up 19.7%). The Ford Focus sits in fifth place (up 3.4%).

Make & Model	Yr_08	Yr_07	% Change 2008	Diff 2008 vs. 2007	Market Share Yr_08
LADA 2105/2107	186,188	208,472	-10.7%	-22,284	6.89%
LADA SAMARA	167,441	187,643	-10.8%	-20,202	6.19%
LADA PRIORA	127,252	57,823	+120.1%	+69,429	4.71%
LADA KALINA	94,014	78,550	+19.7%	+15,464	3.48%
FORD FOCUS	93,496	90,429	+3.4%	+3,067	3.46%
CHEVROLET LACETTI	81,656	40,627	+101.0%	+41,029	3.02%
RENAULT LOGAN	74,300	67,844	+9.5%	+6,456	2.75%
HYUNDAI ACCENT	66,378	53,616	+23.8%	+12,762	2.45%
TOYOTA COROLLA	63,986	38,942	+64.3%	+25,044	2.37%
MITSUBISHI LANCER	62,374	52,157	+19.6%	+10,217	2.31%

The above data is provided by JATO Consult, the company's bespoke consulting service which offers customers access to its unique data and provides solutions and advice to meet a wide range of automotive business challenges. For more information visit [www.jato.com](http://www.jato.com) or email [consult@jato.com](mailto:consult@jato.com).

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### Editorial note: JATO Dynamics background

JATO was founded in 1984 and provides the world's most timely, accurate and up-to-date intelligence on vehicle specifications and pricing, sales and registrations, news and incentives. The company has representation in over 40 countries, providing unique local market expertise. The JATO client base includes all of the world's volume vehicle manufacturers, giving them the ability to react to short-term market movements, plan for long-term developments and ultimately to meet consumers' needs. JATO's data has also been adapted for consumer use in motoring web portals where customers can see the advantages and disadvantages of a specified model against any other while major leasing companies use JATO data to drive the vehicle quotation process. Visit JATO at [www.jato.com](http://www.jato.com).

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